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Ask an Advisor: How much tech should clients see?
By Rob Burgess
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Advisors spend a lot of time selecting and managing their technology tools to deliver for their clients. But clients don't hire advisors for their tech; they hire them for their financial expertise — and their results.

That raises a question: How much of an advisor's tech toolkit should clients actually see? Can showing the tools behind the advice build trust, or does it risk undermining the advisor's value?

As with so much in financial advice, the answer depends in large part on the individual client.

Some want complete transparency and enjoy learning about systems and tools — often younger clients in particular. Others prefer to see little to nothing, trusting their advisor to manage the details so they do not have to.

The type of technology also matters. Some tools are designed for client-facing interaction and have well-thought-out interfaces. Others that may be critical on the back-end can be difficult to explain.

Even if clients are curious and want the full tech tour, oversharing can create diminishing returns, shifting the focus from advisor insight to the tools themselves. Does leaning too heavily on showcasing technology risk decreasing the perceived value of the advisor?

We asked advisors across the country how they approach showing technology to their clients.

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Taking a 'glass box' approach
Neil Krishnaswamy, president of Krishna Wealth Planning in McKinney, Texas:

"As a former engineer turned financial advisor, I work with many clients from technical backgrounds who value data and transparency. Taking a 'glass box' approach, we recently launched a dedicated tech stack webpage. Engineers like to see 'under the hood,' so we explicitly list our tools.

"RightCapital for financial planning and Holistiplan for tax analysis are our 'hero' apps, allowing us to move away from static PDFs and toward live, interactive modeling.

"The hardest areas to demonstrate are back-end integrations, like AI note-taking and investment analytics. While these ensure our firm operates effectively, they should be felt through a seamless experience, not seen."

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Show and prove
Peyton Falkenburg, executive vice president of NBC Securities in Birmingham, Alabama:

"Our advisors focus on using and showing technology that improves understanding and communication, which reinforces our clients' trust in us.

"Black Diamond's portfolio review tool allows us to customize reports based on clients' portfolio needs. Addepar gives us a holistic view of clients' wealth across accounts. Planning and risk tools like Nitrogen help clients understand risk and have more confidence in the advisor's process. CRM and practice management tools are more behind-the-scenes but are an integral part of shaping the client experience and show their value in delivering faster execution, reducing friction and allowing advisors to focus on client goals."

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Demonstrating results, not pulling back the curtain
Eric Franklin, managing principal at Prospero Wealth in Seattle:

"We generally do not 'demonstrate' technology. Our advisors are the human interface to our technologies and are responsible for delivering the output and recommendations in a way that resonates with our clients.

"I once added a tool for capturing risk tolerance and a follow-up investment analysis to my website. While I did get a couple of meetings out of it, I found the prospects who came in were anchored only to the questions they'd been asked. It was hard to go back upstream and ask larger questions about other goals that could dramatically impact the answers they had given. Tech on its own tends to pigeonhole. The real art of financial advising comes from tailoring our technology outputs back to the salient matters for each client."

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Many clients want to 'spend less time thinking about this garbage'
Samantha Mockford, associate wealth advisor with Citrine Capital in San Francisco:

"For the most part, the clients just want to know the output. Most financial software reports are full of data that clients find irrelevant. Their time and mental energy are scarce. That is why they hired a financial advisor in the first place. Our firm curates a dashboard of the info clients inquire about most often,

like investment performance and probability of success.

"Our clients have limited access to our financial planning software, RightCapital. A few enjoy adjusting radio sliders and seeing how it impacts their overall probability of success. Most do not.

"One client even explicitly said one of his financial goals is to 'spend less time thinking about this garbage.' Other clients probably share that goal."

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Think about it like going to a car mechanic
Derrick Alexander, owner and lead financial advisor at Greater Works Wealth in Tulsa, Oklahoma:

"Seven out of 10 times, showing the software bare-bones can cause more confusion than clarity. It's our job to take this more complex software and make it understandable and relatable. Think about when you take your car to see a mechanic. Would it be helpful if the mechanic showed me his tech stack for diagnosing my vehicle? For most people, no. I just want to know how much it costs and if it is fixed."

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Clients don't care about the tech stack
Dan Pascone, founder and CEO of Tailored Wealth in Fairfield, Connecticut:

"Clients care about whether their financial life makes sense and whether we can help them make better decisions without adding friction. The demonstration happens through the output, not a features tour.

"We keep the client-facing tech simple with RightCapital for financial planning software and Orion for portfolio reporting. Everything else we do behind the scenes feeds into those two platforms. The planning software shows them the 'what ifs.' The portfolio software shows them the 'what is.'

"If a tool doesn't directly help a client make a decision or understand their plan better, they don't need to see it.

"If we ever give the impression that the software is doing the advising, we've failed. The tech is there to make our advice clearer and our execution tighter. It also allows us to provide more services and a sort of 'one stop shop' for all their financial needs."

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